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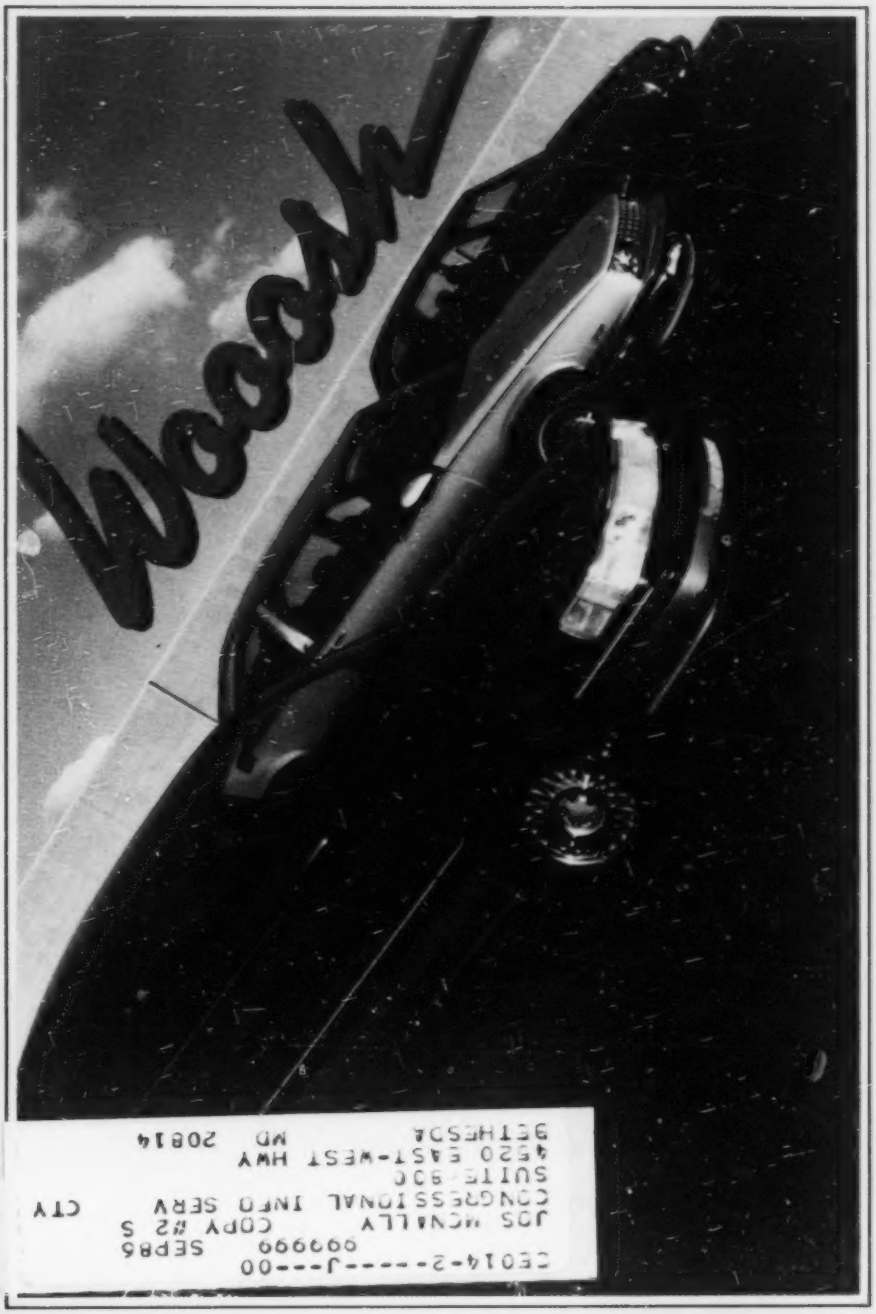

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NEW CARS!

T-Minus '86 And Counting

GM shrink-wraps Riviera/Toronado and brown-shoes LeSabre/Delta 88

Ford tones down Taurus/Sable

Chrysler waits for '87

Toyota front-drives the Celica

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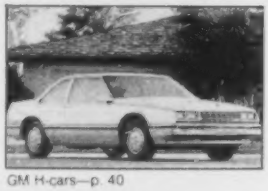
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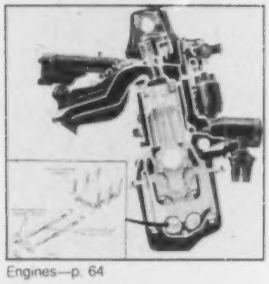
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NEXT MONTH

Building The '86s: Close-ups the plants and people building the '86 domestics. Plus: Cadillac's future plans in the modern, downsized world.

QUOTABLE

"There's a lot of talk about the latest initiative the Japanese have in terms of opening their market. Since 1980, I believe, this is either the sixth or seventh initiative on the part of the Japanese. And their export trade balance has increased from $2 billion to $50 billion."—Harold Poling, president Ford Motor Co.

AUTOMOTIVE INDUSTRIES (ISSN 0273-656x) magazine is published monthly by Chilton Co., Chilton Way, Radnor, PA 19089. Chilton Company is a division of American Broadcasting Companies Inc., New York, NY. Subscription rates and single copy prices on request. Second Class Postage paid at Wayne, PA 19087 and additional mailing offices. POSTMASTER: Send address changes to AUTOMOTIVE INDUSTRIES, P.O. Box 1441, Riverton, NJ 08077. _Chilton Company, 1985. Permission to photocopy for internal use or the internal use of specific clients is granted by Chilton Company for libraries and other users registered with the Copyright Clearance Center (CCC), provided that the base fee of $1.00 per copy of the article, plus 25¢ per page is paid directly to the CCC, 21 Congress St., Salem, MA 01970. Special requests should be addressed to The Editor. (0273-656x/85 $1.00 + 25¢)

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Japanese Trucks Make US Beachhead

by Joseph M. Callahan

Following on the heels of the European truck manufacturers who are getting established in the US, four Japanese truckmakers—Hino, Mitsubishi, Isuzu and Nissan Diesel—are preparing to assault the $10-billion US medium- and heavy-duty truck business. In much the same manner as their European counterparts, they're starting slowly in the medium-duty market.

The general perception of the US manufacturers is that the Japanese will first bring in their medium-duty trucks to lay the groundwork and establish their reputations. Then they'll introduce their Class 8 trucks in three or four years.

Edward T. Mabley, manager of heavy truck development for Ford Truck Operations, said "It's unfolding like the [Japanese] car thing." He was apparently alluding to the way Japanese automakers began at the low end of the market and gradually added value to their products.

CLASS 4-7 TRUCK IMPORT PENETRATION (1983-85)

	1983	1984	1985*
Mercedes-Benz/ Freightliner	3.0%	2.1%	3.8%
Volvo-White	1.1	1.1	1.1
Renault-Mack	3.1	3.5	4.2
Iveco	0.6	0.7	1.0
GM-Isuzu	0	0.8	1.3
Hino	0	0.2	0.2
Total %	7.8	8.4	11.6
Total Import Sales	7517	10,039	3,595

Source: State Registrations * First quarter of 1985

The Japanese will not have the advantage that Mercedes-Benz, Renault and Volvo have had in "marrying" Freightliner, Mack and White respectively, links which have provided them with dealers for national distribution and service.

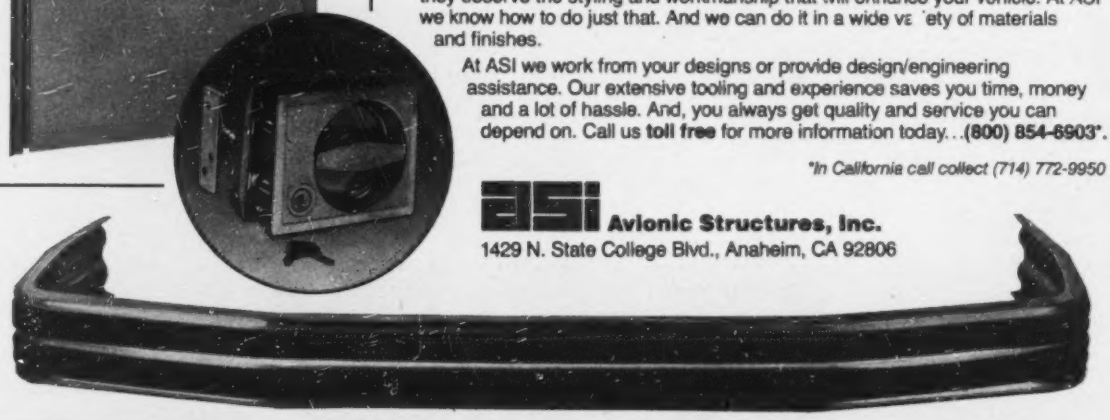
As a consequence, the Japanese four are developing their own distribution systems, either by setting up their own small dealer networks or, more commonly, dualing with the domestic dealers of GM, Ford or anyone else. This is illegal in Japan and isn't practiced in Europe or elsewhere.

25% Cost Advantage

However, the Japanese have a distinct cost advantage, estimated by Ford analysts to be about 25%. The US tariff on these trucks is just 4%, compared to 25% for pickups under 8500 pounds (*3855 kg*) The domestic companies naturally are aware of this and have begun positioning themselves to compete with similar low-cost trucks.

Ford Motor Co. is now taking US delivery of the first 35 medium-duty "Cargo" trucks it has been building in Brazil for other markets. Nearly 500 more Cargos are expected to land

(Continued)



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here soon.

GMC Truck and Coach and Chevrolet have begun marketing a medium cab-over truck from Isuzu which will be sold by its own 103-unit dealer body. And International Harvester has reportedly okayed plans to market Nissan Class 6 and 7 trucks.

Despite all the investing and maneuvering by the four Japanese firms, the above-mentioned European companies, plus Iveco and Saab-Scania, the US medium-duty market is still tranquil because the import numbers are still quite small (see chart).

The medium duty trucks will lay the groundwork; Class 8s will arrive in three to four years.

Based on US registrations compiled by one domestic truck company, the imports only took 7.8% or 7517 units of the 96,371 sales in the Class 4 through Class 7 market of 1983. Import sales increased slightly to 8.4% or 10,039 units out of 119,511 sales in 1984 and comprised 11.6% or 3595 units of the 30,991 total medium trucks sold in the first quarter of 1985.

Making the new Japanese beachhead even more formidable is that they've begun hiring some top-notch American trucking talent. Thomas Reimer is one such executive; formerly vice-president of sales, marketing and product planning at International Harvester, Reimer is now with Hino.

Mabley said the importation of trucks into this country is also being accelerated by a lowering of truck shipping costs as a result of the use of larger and more efficient ships.

Tariffs Lower

Strangely, it's cheaper to bring a fully-assembled truck into this country than it is to import a completely knocked down (CKD) or semi knocked down (SKD) truck. Compared to the 4% tariff on a complete truck, the SKD tariff is 10% and the CKD tariff varies from 15 to 18%. ★

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